

AGENDA
TEXCOM MEETING
Trusts and Estates Section
State Bar of California

June 16, 2007
Oakland Airport Hilton
Oakland, California



*"When I go, I plan on taking at least two of my
goddam estate-tax lawyers with me."*

**SATURDAY, JUNE 16, 2007
9:30 am-3:30 pm**

**I. WELCOME, INTRODUCTIONS AND REPORTS OF CHAIR/VICE CHAIR
(15 minutes)**

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| A. Welcome | [HARTOG] |
| B. Approval of Minutes of April Retreat Meetings | [HARTOG] |
| C. Report of Chair (5 min) | [HARTOG] |
| ETHICS GUIDE | |
| D. Report of Vice Chair (5 min) | |
| Finance and Budget – Financial Report | [STERN] |
| E. Report of Section Administrator (5 min) | [ORLOFF] |

COMMITTEE, TASK FORCE AND LIASION REPORTS

I. TECHNOLOGY (5 minutes) [GAW]

- A..E-Newsletter
- B.Website
- C.Protocols

II. INCOME AND TRANSFER TAXES (5 min) [HAYES]

III. CEB (5 min) [GOOD]

IV. EDUCATION (5 min) [ALBERIO]

- A. Stand Alone programs
 - 1.Advanced Topics
 - 2. Botched Trusts
- B. 2007/2008 Winter SEI
- C. Your Legal Rights

V. CLRC (100 min) [HORTON]

- | | |
|------------------------------|----------|
| A. No Contest Clause Study | [Kovar] |
| B. Care Custodian Task Force | [Horton] |

VI. QUARTERLY (5 min) [HAND]

- A. Manuscripts
- B. Authors

VII. ESTATE PLANNING (40 min) [MACDONALD]

- A.. COPRAC Opinion 05-003 (Schenone)
- B. COD Resolution on PC 6402.5 (Ehrman)
- C. Formal Will Witness Requirements (Reggiardo)
- D. .Gov't Code 8201-Notary Public Education (Potts)
- E. AB 250 Revocable TOD Deeds (Ito/Schenone)
- F. AB 861 ATRO (Ehrman)
- G. AB 374 Compassionate Choices Act (Tong)
- H. State Bar Brochures (Ehrman)
- I. AB 703 Locked Cabinets: Social Security Numbers: (Ehrman)

LUNCH

VIII. INCAPACITY (90 minutes) (TONG)

A. STANDING COMMITTEE PROBATE AND MENTALHEALTH – PROPOSALS
FOR COMMENT MAY 1, 2007
(STERN)

B. JUDICIAL COUNCIL CONSERVATORSHIP TASK FORCE
REPORT (STERN)

C. PENDING BILLS (Developments)

AB 267 (Calderon – Annuity Sales) & SB 573 (Scott-Annuity Sales)	Corey
AB 316 (Spitzer – Conservatorship Investment Standards)	Stern
AB 1727 (Jones – Omnibus Act clean up bill)	Stern
AB 500 (Lieu – telephonic appearances in probate & conservatorship Proceedings)	TBA
SB 183 (Corbett – Estate of Lowrie W&I Code sec 15657.3)	Tong
SB 241 (Kuehl – Representation of minors in probate proceedings)	Wallet/Sallus
SB 611 (Steinberg – Elder Financial Restitution Act, attachment)	Corey
SB 800 (Corbett – care plans, reinstitution of general plan)	Lodise

D. EDUCATING SENIORS (Sallus)

1. Speakers Bureau	(Sallus)
2. Use of AMA funds	(Tong)
3. Senior Information Card dissemination	(Doyle/Kosloff)
Senior Tool Kit	Tong

E.. PROBATE CODE § 1470 (APPOINTED COUNSEL FOR
ALREADY REPRESENTED) (Beltran)

F. MEDI-CAL UPDATES (Stern)

G PROFESSIONAL FIDUCIARIES BUREAU (Tong))

IX. TRUST & ESTATE ADMINISTRATION (15 min) [BURGER]

- A.. Increased Limits on 13100 proceedings SB 553
- C. Creditors' Claim harmonization AB341 (Hartog)
- D. AB 604
- E. Incapacitated Dentists SB 387

X. LEGISLATION (5 min) [REGGIARDO]

- 1 Timeline for TEEComm legislative proposals
- 2 Mandatory procedures re legislative proposals
- 3. Online Bill Tracking legislative information:
 www.leginfo.ca.gov/

IMPORTANT GUIDELINES:

- Please use approved format for legislative proposals.
- Please use approved comment form for legislation comments.
- Always write to Larry Doyle, not directly to a member of legislature or legislative staff.
- Confirm testimony needs with Legislation Chair.
- If you agree to testify, be there unless otherwise notified

XI. LITIGATION (5 min) [KOVAR]

Attorney Fee Shifting

XII. CONFERENCE OF DELEGATES (5 minutes) (HENDEN)

XII. MEMBERSHIP & MARKETING (5 min.) [KOSLOFF]

XIV. NCCUSL (5 min) [GODSHALL]

XV. NEW BUSINESS

XVI COMING ATTRACTIONS

**NEXT TEXCOM MEETING
SEPTEMBER 30, 2007
9:00 am-3:00pm
ANAHEIM HILTON**